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STATE PLAN ON AGING
UNDER
TITLE III OF THE
OLDER AMERICANS ACT

for
MONTANA

(Name of State)

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VERIFICATION OF INTENT

The State Plan on Aging is hereby submitted for the State of Montana for the period October 1, 1980, through September 30, 1983. It includes all assurances and plans to be conducted by the Department of Social and Rehabilitation Services,

(Name of State Agency)

Aging Services Bureau under provisions of the Older Americans Act, as amended, during the period identified. The State Agency identified has been designated the authority to develop and administer the State Plan on Aging in accordance with all requirements of the Act, and is primarily responsible for the coordination of all State activities related to the purposes of the Act, i.e. the development of comprehensive and coordinated systems for the delivery of social services, including multipurpose senior centers and nutrition services, and to serve as the effective and visible advocate for the elderly in the State.

This Plan is hereby approved by the Governor and constitutes authorization to proceed with activities under the Plan upon approval by the Commissioner, Administration on Aging.

The State Plan on Aging hereby submitted, has been developed in accordance with all rules and regulations specified under the Older Americans Act.

(Date) (Signed) _____
(State Unit on Aging Director)

(Signed) _____
(State Agency Director,
where applicable)

The State Advisory Council on Aging has had the opportunity to review and comment on the State Plan on Aging. (Review comments are attached.)

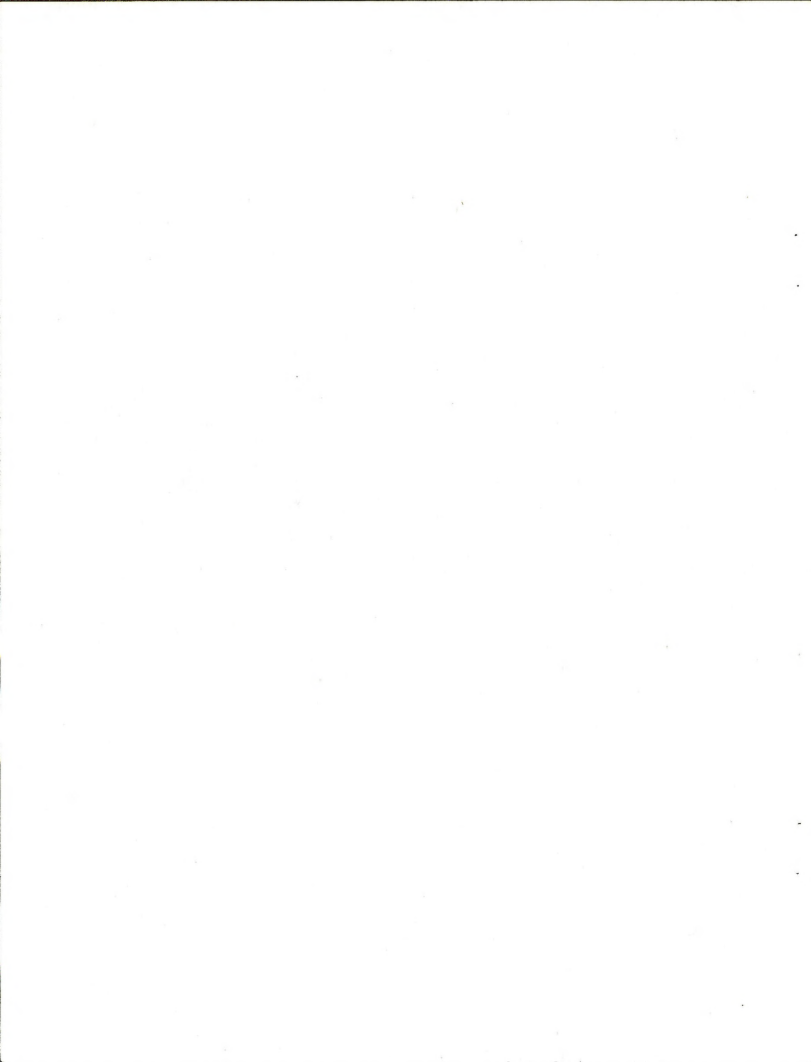
(Date) (Signed) _____
(Chairperson of State Advisory
Council on Aging)

I hereby approve this State Plan on Aging and submit it to the Commissioner on Aging for approval.

(Date) (Signed) _____
(Governor)

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SECTION 1: GENERAL ASSURANCES

The State Agency must maintain documentation to substantiate all of the following assurance items. Such documentation will be subject to Federal review for adequacy and completeness.

A. General Administration

1. Compliance with Requirements

The State Agency agrees to administer the program in accordance with the Act, the State Plan and all applicable regulations, policies and procedures established by the Commissioner or the Secretary.

2. Efficient Administration

The State Agency utilizes such methods of administration as are necessary for the proper and efficient administration of the Plan.

3. General Administrative and Fiscal Requirements

The State Agency's uniform administrative requirements and cost principles are in compliance with the relevant provisions of 45 CFR Part 74 except where these provisions are superceded by statute.

4. Training of Staff

The State Agency provides a program of appropriate training for all classes of positions and volunteers, if applicable.

5. Management of Funds

The State Agency maintains sufficient fiscal control and accounting procedures to assure proper disbursement of and accounting for Federal funds under this Plan.

6. Safeguarding Confidential Information

The State Agency has implemented such regulations, standards and procedures as are necessary to meet the requirements on safeguarding confidential information under relevant program regulations.

7. Reporting Requirements

The State Agency agrees to furnish such reports and evaluations to the Secretary or the Commissioner as may be specified.

8. Standards for Service Providers

All providers of service under this Plan operate fully in conformance with all applicable Federal, State and local fire, health, safety and sanitation and other standards prescribed in law or regulations. The State Agency provides that where the State or local public jurisdictions require licensure for the provision of services, agencies providing such services shall be licensed.

9. Amendments to State Plan

State Plan amendments will be made in conformance with applicable program regulations.

10. A-95 Review

The State Agency has submitted this Plan and any amendments to the Governor for review and comments as required by OMB Circular A-95.

B. Equal Opportunity and Civil Rights

1. Equal Employment Opportunity

The State Agency has an equal employment opportunity policy, implemented through an affirmative action plan for all aspects of personnel administration as specified in 45 CFR Part 70.4.

2. Non-Discrimination on the Basis of Handicap

All recipients of funds from the State Agency are required to operate each program activity so that, when viewed in its entirety, the program or activity is readily accessible to and useable by handicapped persons. Where structural changes are required, these changes shall be made as quickly as possible, but by June 30, 1980 at the latest, in keeping with 45 CFR 84.

3. Civil Rights Compliance

The State Agency has developed and is implementing a system to ensure that benefits and services available under the State Plan are provided in a non-discriminatory manner as required by Title VI of the Civil Rights Act of 1964 as amended.

C. Provision of Services

1. The State Agency has a reasonable and objective method for determining the needs of all eligible residents of all geographic areas in the State for allocating resources to meet those needs.

2. Priorities

The State Agency has a reasonable and objective method for establishing priorities for service and such methods are in compliance with the applicable statute.

3. Eligibility

The activities covered by this State Plan serve only those individuals and groups eligible under the provisions of the applicable statute.

4. Residency

No requirements as to duration of residence or citizenship will be imposed as a condition of participation in the State's program for the provision of services.

5. Coordination and Maximum Utilization of Services

The State Agency to the maximum extent coordinates and utilizes the services and resources of other appropriate public and private agencies and organizations.

SECTION 2: PROGRAM SPECIFIC ASSURANCES

STATE AGENCY ORGANIZATION

Section 305(a)(1), 1321.13

The State Agency is the sole State responsible for the administration of the State Plan on Aging. Where the State Agency is a multipurpose Agency, it delegates all authority and responsibility for administration of the State Plan to a designated organizational unit in the Agency unless a waiver of this requirement is granted by the Commissioner.

STATE ALLOTMENT

Section 308(a)(1), 1321.199(a)

A state Agency will use its allotment for State Plan administration to pay not more than 75 percent of the costs of administering the State Plan.

Section 304(d)(1)(A), 1321.199(b)

Such amount as the State Agency determines but no more than 8.5 percent of the State's allotment will be used for paying such percentage as the State determines but no more than 75 percent of the cost of administration of Area Plans.

Section 304(d)(1)(B), 1321.199(c)

The portion of the State's allotment* not used for paying the cost of administration of Area Plans will be available only for paying such percentage as the State determines, but not more than 85 percent of the cost of social services and nutrition services authorized under Title III, Parts B and C, in the Planning and Services Areas for which there is an Area Plan approved by the State Agency.

Section 309, Section 304(d), 1321.113, 1321.201, 1321.203, 1321.205

The State Agency will fulfill all requirements for meeting the non-Federal share.

STATE AGENCY RESPONSIBILITIES

Section 305(a)(1)(D), 1321.41

In addition to current duties the State Agency will serve as an effective and visible advocate by reviewing and commenting upon all State Plans, budgets, and policies which affect the elderly and providing technical assistance to agencies, organizations, associations, and individuals serving the elderly.

* Excepting the provision of funds for the Long-Term Care Ombudsman program (Section 307(a)(16)).

Section 305(a)(1)(E), 1321.53(c)

The State Agency will divide the State into Planning and Service Areas according to statutory and regulatory requirements.

Section 305(a)(2)(C)(D), 1321.49

The State Agency will, in accordance with guidelines issued by the Commissioner, develop, publish, and submit to the Commissioner for review and comment a formula for the distribution of Title III funds within the State.

Section 305(a)(2)(E), 1321.25(g)(4)

The State Plan contains proposed methods of carrying out the preference to older individuals with the greatest economic or social need in the provision of services.

Section 305(b)(1), 1321.53

Upon request the State Agency will provide an opportunity for a hearing to any unit of general purpose local government, including units of 100,000 or more, if such unit(s) make(s) an application for PSA designation and is denied designation by the State Agency.

STATE PLAN

Section 307(a), 1321.23

The State Agency will submit a State Plan for three-year period with such annual revisions as are necessary.

Section 307(a)(1), 1321.29

The State Plan will be based on Area Plans developed by the State with Area Agencies on Aging.

Section 307(a)(1), 1321.25(b)(6), 1321.45(a)(10)

The State will prepare and distribute a uniform format for use by Area Agencies in developing Area Plans under Section 306.

Section 307(a)(2), 1321.71, 1321.73

Each Area Agency will develop and submit to the State Agency for approval an Area Plan which complies with Section 306 of the Act.

Section 307(a)(3)(A), 1321.25(b)(4), 1321.45(a)(8)

The State Agency will evaluate the need for nutrition and multipurpose senior centers and will include legal services in its evaluation of the need for social services.

Section 307(a)(3)(B), 1321.185

The State Agency will spend in each fiscal year, for services to older individuals residing in rural areas in the State assisted under this Title, an amount not less than 105 percent of the amount expended for such services (including amounts expended under Title V and Title VII) in FY 1978.

Section 307(a)(4), 1321.15

The State Agency will, where necessary in providing for the use of proper and efficient methods of administration, also provide for the reorganization and rearrangement of functions, to assure efficient administration.

Section 307(a)(5), 1321.51

The State Agency will grant a hearing upon request to any Area Agency on Aging submitting a Plan under Title III, to any provider of a service under such a Plan, or to any applicant to provide a service under such a Plan.

Section 307(a)(7), 1321.15

The State Agency will provide satisfactory assurance that such fiscal control and fund accounting procedures will be adopted as may be necessary to assure proper disbursement of, and accounting for, Federal funds paid under this Title to the State, including any such funds paid to the recipients of grant or contract.

Section 307(a)(9), 1321.45(a)(16)

The State Agency will provide for establishing and maintaining information and referral services in sufficient numbers to assure that all older individuals in the State who are not furnished adequate information and referral services under Section 306(a)(4) will have reasonably convenient access to such services.

Section 307(a)(10), 1321.103

No social services, including nutrition services, will be directly provided by the State Agency or an Area Agency on Aging, except where, in the judgment of the State Agency provision of such services by the State Agency or an Area Agency on Aging is necessary to assure an adequate supply of such services.

Section 307(a)(11), 1321.17(c)

Subject to the requirements of merit employment system, the State Agency gives preference to individuals age 60 or older for any staff positions in State and Area Agencies for which such individuals qualify.

Section 307(a)(12), 1321.43

With respect to the Long-Term Care Ombudsman program the State assures that statutory and regulatory provisions concerning establishment and operation of the program; defining "similar adult care homes"; appointing an ombudsman; access requirements; confidentiality and disclosure requirements and a Statewide reporting system will be met.

Section 307(a)(13), 1321.141-1321.147

With respect to nutrition services the State assures that statutory and regulatory provisions concerning nutrition services, selection of nutrition services providers, special requirements for nutrition services providers and food requirements for all nutrition services providers will be met.

Section 307(a)(14), 1321.121-1321.137

With respect to multipurpose senior centers the State assures that all statutory and regulatory requirements concerning the purpose of making awards; health and safety and construction requirements, Federal labor standards, length of use of an acquired or constructed facility, special conditions for acquiring by purchase, or constructing a facility; prohibition on sectarian use of a facility, and funding and use requirements will be met.

Section 307(a)(15), 1321.151

With respect to legal services the State assumes that statutory and regulatory provisions concerning purpose of making the awards; conditions legal service providers must meet case priorities; and limitations on information about income and resources are met.

Section 307(a)(16), 1321.189

From funds allotted under Section 304(a) for Part B of Title III (relating to social services), the State Agency will use an amount equal to 1 percent of this allotment or \$20,000, whichever is greater, for the purpose of carrying out the Long-Term Care Ombudsman program (Section 307(a)(12)) unless for any fiscal year, a State spends from State or local sources an equivalent amount for this purpose.

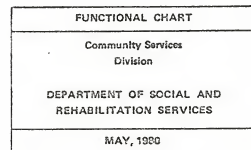
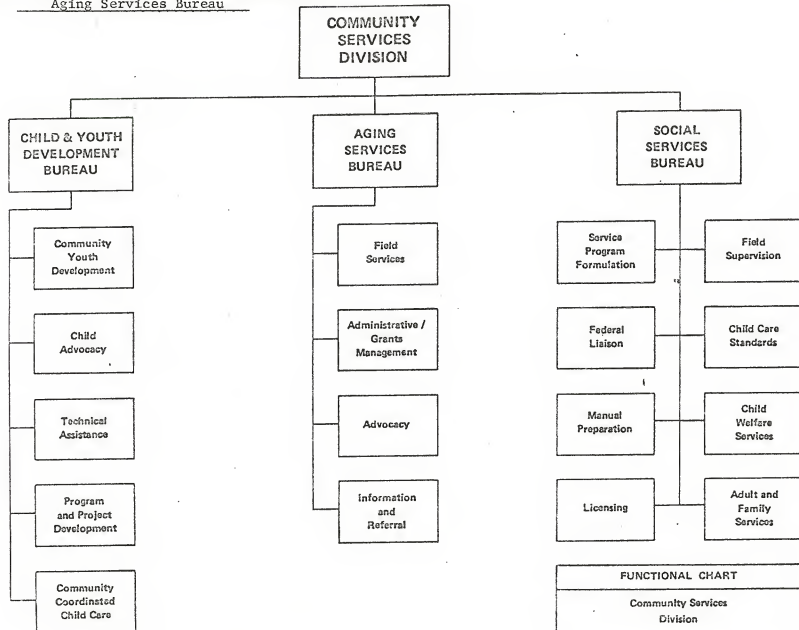
(This assurance is not required of American Samoa, Guam, Virgin Islands, the Trust Territory of the Pacific Islands, and the Northern Mariana Islands.)

SINGLE STATE PLANNING AND SERVICE AREA

Section 305(a)(1)(E), § 1321.59

A State may apply to the Commissioner for approval to designate the entire State as a Single Planning and Service Area. If the Commissioner approves the application, the State agrees to develop a Single State Planning and Service Area Plan and to meet all State and Area Agency function requirements specified in the regulation.

SECTION 3: ADMINISTRATIVE STRUCTURE



STATE: Montana
STATE AGENCY: Social and Rehabilitation Services
Aging Services Bureau

3.A.1 ORGANIZATION OF STATE AGENCY

3 of 3 Pages

AGING SERVICES ADVISORY COUNCIL - advises the Department on programs and the State Plan affecting Senior Citizens of Montana.

MEDICAL ASSISTANCE ADVISORY COUNCIL - advises the Department on the Medical Assistance Program.

REHABILITATIVE SERVICES ADVISORY COUNCIL - advises the Department on the problems of deaf, rehabilitation facilities, and general direction of the Rehabilitative Services Program.

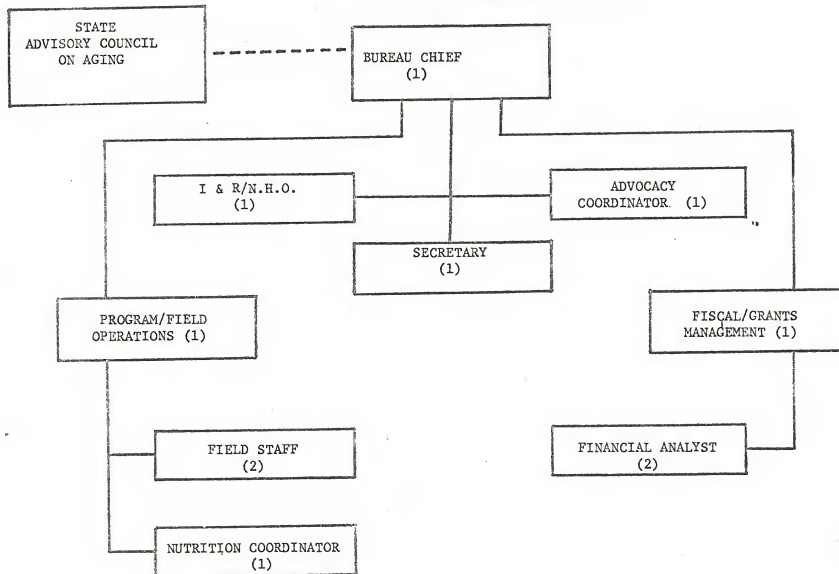
STATE DEVELOPMENTAL DISABILITIES PLANNING COUNCIL - a statutory planning council which advises the Department and all related agencies on all aspects of the developmental disabilities program planning.

REGIONAL DEVELOPMENTAL DISABILITIES PLANNING COUNCILS (one in each of five regions) - assists regional staff with developmental disabilities program planning within their respective geographical regions.

VISUAL SERVICES ADVISORY COUNCIL - advises the Department and the Visual Services Division on the problems of the blind and visually impaired and the Montana State Plan for services to the blind.

State Agency: Social and Rehabilitation Services
Aging Services Bureau

3. A.2 Single Organizational Unit



State: Montana
State Agency: SRS, Aging Services Bureau

3.B.1 AREA AGENCIES ON AGING DESIGNATED TO ADMINISTER
THE OLDER AMERICANS ACT PROGRAM
AT THE SUBSTATE LEVEL

Below is an identification of Area Agencies within the State, including the Agencies' names, addresses, and PSA map reference key.

Action for Eastern Montana
Area I Agency on Aging
306 North Kendrick
Glendive, Montana 59330
Director: Lori Lovaas
Phone: 406-365-3364

Area II Agency on Aging
201½ South Main Street
Roundup, Montana 59072
Director: Wayne Britt
Phone: 406-323-1320

North Central Area Agency
on Aging
323 South Main
Conrad, Montana 59425
Director: Earline Zoeller
Phone: 406-278-5662

Rocky Mountain Development
Council
Area IV Agency on Aging
201 South Main
Box 721
Helena, Montana 59601
Director: Roger Ala
Phone: 406-442-1552

Area V Agency on Aging
115 East Pennsylvania
Ananconda, Montana 59711
Director: Jane Anderson
Phone: 406-563-3110

Western Montana Area Agency on
Aging
723 - 5th Avenue East
Kalispell, Montana 59901
Director: Polly Nikolaisen
Phone: 406-755-5300 Ext. 336

Ft. Belknap Community Council*
Tribal Elders Program
Box 961
Ft. Belknap Agency
Harlem, Montana 59526
Director: Cynthia LaCounte
Phone: 406-353-2205 Ext. 236.

* See State Plan Attachments.

SECTION 4: PROGRAM PLAN

State: Montana

3. B.2 PLANNING AND SERVICE AREA MAP

State Agency: SRS, Aging Services Bureau

MONTANA



* - Area Agency on Aging Office for
Six Indian Reservations Indicated
(PSA VII)

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.A.1 ADVOCACY PLAN: POLICIES AND PRIORITIES

Policies and priorities are presented below regarding the State's role as an advocate for the elderly.

Within this policy the thrust is always toward advocacy for those least able to advocate for themselves, i.e. those in greatest social and economic need. The multi-layered concerns of advocacy are many and varied. Those to receive particular emphasis by this Bureau include:

- a. Increasing the availability of the least restrictive adequate long term care options for older persons. An Adult Care Home in Montana is limited to skilled nursing facilities, intermediate care facilities, and nursing homes as defined in Section 1321.43(b) of Title 45, Code of Federal Regulations.
- b. Increasing statewide awareness of the rights and capabilities of older persons.
- c. Reducing obstacles faced by older persons to normal participation in society.
- d. Increasing statewide awareness of the nature of aging and aging services.
- e. Improving the responsiveness of the aging network and the public to the expressed (as opposed to the perceived) interests of the elderly.
- f. Expanding crime prevention efforts.
- g. Increasing statewide awareness of the ramifications of the Age Discrimination Act and the Age Discrimination in Employment Act.
- h. Expanding the Information and Referral system to reach Montana seniors with services they need to maintain independent living situations, and to insure that Montanas in nursing homes have access to responsive advocacy system.
- i. Expanding efforts to make political and bureaucratic systems responsive to the needs of Montana's elderly.
- j. Cooperating with other entities seeking expanded senior employment opportunities.
- k. Cooperating with other entities seeking expanded low-income housing availability for seniors.

4.A.1 ADVOCACY PLAN: POLICIES AND PRIORITIES (Continued)

The Aging Services Bureau is committed above all else to an advocacy program at every level that will maximize the independent living situation of Montana's elderly. The Bureau seeks to advocate services necessary to foster the dignity and independence of each person over 60 in our state. The Bureau believes that the vast majority of the senior population can continue to live in their own homes and localities with minimal supportive services, and that this in-home priority is not only the most humane, but also the most cost effective service delivery system. The Bureau recognizes that a small percentage of Montana's elderly need the kinds of skilled care delivered in an institutionalized setting. The Bureau is committed to maximize the independence of these people as well. Their right to make as many decisions for themselves as possible must be honored and protected by this Bureau through an integrated advocacy system.

The Bureau recognizes the importance of keeping people informed about issues affecting the elderly. Furthermore, it recognizes that good communication flow does not occur by accident. A conscious, well-planned effort must be made to direct information to people who need it the most.

Key steps in the accomplishing of this include selecting "targets of opportunity" for improving response time in external and internal communication, increasing contacts with elected officials at the federal, state and county levels and establishing a mechanism for more effectively distributing to the network information about proposed legislation.

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.A.2 ADVOCACY PLAN: GOALS AND OBJECTIVES

The State's overall advocacy goal and related objectives are presented below.

Advocacy Goal: Improve and increase analysis of legislative issues at the state and national level as they affect seniors and coordinate with other groups impact on political systems.

Objectives:

Fiscal
Year

OBJECTIVE ONE: To provide technical assistance to all groups and individuals within the aging network who act as political advocates for Montana elderly. This includes, but is not limited to, the Montana Advocacy Task Force for Seniors, The Montana Senior Citizens Association, the Joint Legislative Committee on AARP/NRTA, the Low-Income Advocacy Task Force for Seniors and the directors of the Area Agencies on Aging.

1981
1982
1983

1a. The Bureau will meet with each of these groups in an effort to establish a coordinating committee with representation from each of the above-named organizations. This committee will meet on a regular basis to establish either legislative priorities and/or to agree on methods for establishing legislative priorities, such as the Legacy Legislature.

1981

1b. The Bureau will provide technical assistance to Montana Advocacy Task Force for Seniors and other senior advocate groups as they support the five priority bills adopted by the Legacy Legislature.

1981
1982
1983

1c. The Bureau under the leadership of the Department of Social and Rehabilitation Services will provide information and testimony on the Bureau budget and the Legacy Legislature's priority bills directly to the Montana State Legislature,

1981
1982
1983

1d. The Bureau will continue to provide all staff assistance necessary to the Montana Advocacy Task Force for Seniors as they conduct the Second Biannual Legacy Legislature in the fall of 1982.

1981
1982
1983

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.A.2 ADVOCACY PLAN: GOALS AND OBJECTIVES

The State's overall advocacy goal and related objectives are presented below.

Advocacy Goal: Improve and increase analysis of legislative issues at the state and national level; and coordinate with other groups impact on political systems.

Objectives:

Fiscal
Year

OBJECTIVE TWO: The Bureau will both participate and coordinate others in the monitoring, evaluating and commenting on policies, programs, hearings and budgets affecting older persons.

1981
1982
1983

2a. The Bureau will coordinate with the Governor's Advisory Council on Aging the joint responsibility of responding to policies, programs, hearings and budgets affecting older persons (Department of Health and Environmental Sciences, Department of Social and Rehabilitation Services, Department of Community Affairs, Department of Institutions, Public Service Commission and other appropriate entities).

1981
1982
1983

2b. Bureau staff will be assigned by the Bureau Chief to monitor the specific issue areas of nursing home reform, nutrition and the politics of food, energy costs and alternatives, social services and others as appropriate.

1981

2c. Testimony, recommendations, information and positions will be communicated with the aging network by weekly distribution of the same to all area agencies and other direct grantees of the Bureau.

1981
1982
1983

2d. The State Advisory Council and the State Agency will annually conduct hearings to determine the special needs of older persons with emphasis on social and economically disadvantaged. Those needs hearings will influence the substance of Advisory Council and State Agency impact on policies, programs, hearings, and budgets affecting older persons.

1981
1982
1983

State: Montana
 State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.A.2 ADVOCACY PLAN: GOALS AND OBJECTIVES

The State's overall advocacy goal and related objectives are presented below.

Advocacy Goal: Improve and increase analysis of legislative issues at the State and National level; and coordinate with other groups impact on political systems.

Objectives:

Fiscal
Year

OBJECTIVE THREE: The Bureau will plan and coordinate Montana's involvement in the White House Conference on Aging.

1981

3a. Area and state community forums will be held to identify and prioritize issues, adopt recommendations for the White House Conference on Aging.

1981

3b. Information and Referral Technicians will be trained regarding their responsibilities for the conduct of these forums.

1981

3d. A state position paper based on products of the community/area forums and the Legacy Legislature will be prepared for submission to the White House Conference on Aging.

1981

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.A.2 ADVOCACY PLAN: GOALS AND OBJECTIVES

The State's overall advocacy goal and related objectives are presented below.

Advocacy Goal: Improve and increase analysis of legislative issues at the state and national level; and coordinate with other groups impact on political systems.

Objectives:

Fiscal
Year

OBJECTIVE FOUR: The Bureau will communicate all reports, policies, positions, comments and testimony to the Montana Congressional Delegation. In addition to those things generated within the state, the Bureau will comment to the Congressional Delegation on issues that affect older Montanas from the national level. This will include a detailed critique of the affects of the Administration on Aging and its relationship to the State office and its responsiveness to the needs of older Montanas.

1981
1982
1983

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.A.2 ADVOCACY PLAN: GOALS AND OBJECTIVES

The State's overall advocacy goal and related objectives are presented below.

Advocacy Goal: To provide leadership in the coordination of statewide planning and programs for the benefit of older persons.

Objectives:

Fiscal
Year

OBJECTIVE ONE: The Bureau in a coordinated effort with the State Advisory Board will develop a position paper including recommendations for coordination of all aging services delivered by the Department of Social and Rehabilitation Services.

1981

OBJECTIVE TWO: The Bureau will work towards seating Bureau staff and State Advisory Board members on boards, councils, and commissions that affect elderly by actively seeking those appointments through letters and attending meetings of those groups.

1981

1982

1983

OBJECTIVE THREE: The Bureau will negotiate an interagency agreement with all state agencies whose normal conduct of business affects older Montanas.

1981

1982

1983

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.A.2 ADVOCACY PLAN: GOALS AND OBJECTIVES

The State's overall advocacy goal and related objectives are presented below.

Advocacy Goal: To maximize the independent living situation of all institutionalized elderly within the state.

Objectives:	Fiscal Year
<u>OBJECTIVE ONE:</u> The Bureau will contract with an appropriate statewide organization(s) to provide at least monthly visits to all nursing homes within the state by a trained nursing home ombudsman.	1981
<u>OBJECTIVE TWO:</u> The long-term care advocacy system will be coordinated by a statewide Nursing Home Ombudsman to be designated by the Bureau Chief.	1981
<u>OBJECTIVE THREE:</u> The Bureau will document the nature and extent of problems encountered by nursing home residents in their pursuit of independent living within the institutionalized setting.	1981 1982 1983
3a. Personal advocacy cases will be handled either by an attorney or by the nursing home ombudsman.	1981 1982 1983
3b. Issues advocacy cases will be referred to the Governor's Advisory Council on Aging and other appropriate advocacy groups.	1981 1982 1983
<u>OBJECTIVE FOUR:</u> Information and Referral Technicians will be further trained in all aspects of long-term care advocacy, and given responsibilities for regular nursing home visitation.	1981
<u>OBJECTIVE FIVE:</u> The State Agency will monitor an agreement consummated between the Division of Hospital and Medical Facilities and the Nursing Home Ombudsman for maximum effectiveness in dealing with complaints handled by each in a joint effort to provide all entities maximum access to physical facilities and records of long-term care institutions.	1981

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.A.2 ADVOCACY PLAN: GOALS AND OBJECTIVES

The State's overall advocacy goal and related objectives are presented below.

Advocacy Goal: To maximize the independent living situation of noninstitutionalized elderly with emphasis on the social and economic security of those older Montanas

Objectives:

**Fiscal
Year**

OBJECTIVE ONE: The State Agency will coordinate with Montana's Green Thumb Program and with the Senior Community Service Employment Program (the state's lead groups in employment opportunity for seniors) to provide them support and technical assistance on an ongoing basis.

1981

OBJECTIVE TWO: The State Agency will continue to maximize effort in discriminating aging services, advocacy and anti-agism information to the public through printing and electronic media. The Age Discrimination Act will be one focus for this information.

1981

OBJECTIVE THREE: The Governor's Conference on Aging will train and inform both the aging network and the public on issues related to independent living such as low-income housing for seniors, public benefit availability, and barrier free access to public buildings (Section 504 of the Rehabilitation Act of 1973 as amended, PL 93-112).

1981

1982

1983

OBJECTIVE FOUR: The State Advisory Council and the Bureau will initiate meetings with the Montana Board of Crime Control to obtain information on crime against the elderly and compensation for victims of crime. Through the governor's office, the Bureau will seek appointment of a senior representative to be seated on this Board.

1981

1982

1983

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.B.1 SERVICE DEVELOPMENT PLAN: POLICIES AND PRIORITIES

Policies and priorities that represent the State's plan to implement service delivery requirements identified in the Act are presented below. This policy statement includes policy for defining methods to be used in giving preference to those with greatest economic or social need.

POLICY

1. Social and Rehabilitation Services, Aging Services Bureau shall give preference to those persons, 60 years of age and older, with the greatest economic or social needs through the inclusion of corresponding components within the intrastate funding formula.
2. Social and Rehabilitation Services, Aging Services Bureau shall develop and annually update standards for outreach services which place major emphasis on increased utilization of all services funded by the Older Americans Act with the greatest economic and social needs.

PRIORITIES FOR SERVICE DELIVERY

Transportation: The extreme ruralness of the state and the relatively small groupings of seniors are conflicting factors in the need and availability of transportation services. Coordination, outside supplemental resources, and extended planning can maximize the existing systems,

Services to Residents of Senior Care Facilities: Seniors placed in care providing facilities face extreme changes in the order of their lives. Isolation, loss of independence and, eventually, condition acceptance, can be minimized and repelled by the provision of the maximum amounts of services from the spectrum that are associated with independent living situations.

Nutrition: As a priority service in Montana, the aging network is attempting to fulfill the need by providing the service through 140 sites statewide. 84% of the sites are in senior centers and direction shall be provided to increase this number from a centralized and cost effective standpoint. To provide program continuity and maintain existing levels, the smooth transition from former funding sources (III B) to presently allowable sources (III C) is of prime importance.

In-Home Services: Services designed to be provided for "in-home" delivery to the senior citizens of Montana will directly relate to the Bureau's purpose and the identified needs of the seniors themselves, that of maintaining independent living conditions and preventing institutionalization. The variety of services that will ultimately assist in this endeavor are; homemaker, chore, home-health, and home-delivered meals.

State: MontanaState Agency: Social & Rehabilitation Services - Aging Services Bureau

4.B.2 SERVICE DEVELOPMENT PLAN: GOALS AND OBJECTIVES

This chart specifies the State's overall service delivery goals and objectives for multipurpose senior center activities, nutrition services, legal services, information and referral services, as required, as well as other service delivery objectives representing statewide priorities. Objectives are organized by the following categories: access services, in-home services, community services, services to residents of care providing facilities.

Service Delivery Goal: Make all services for the elderly known and accessible to the senior citizens of Montana.

Objectives:	Fiscal Year
<p><u>OBJECTIVE ONE:</u> Social and Rehabilitation Services, Aging Services Bureau shall provide extensive training on the total aspect of services for seniors in Montana to all I & R/N.H.O. technicians to further their information providing techniques.</p>	<p>1981 1982 1983</p>
<p><u>OBJECTIVE TWO:</u> Social and Rehabilitation Services, Aging Services Bureau will complete a statewide analysis of (a) transportation systems available for utilization by senior citizens; (b) outreach activities for senior citizens; and (c) services being provided to senior citizens who are residents of care providing facilities.</p>	<p>1981</p>
<p><u>OBJECTIVE THREE:</u> Social and Rehabilitation Services, Aging Services Bureau will establish and initiate structural criteria for systems to increase the effectiveness of transportation systems, outreach activities, and services to residents of care providing facilities to insure that the seniors have access to services.</p>	<p>1982</p>
<p><u>OBJECTIVE FOUR:</u> Social and Rehabilitation Services, Aging Services Bureau will analyze and redirect, if necessary, all activities conducted to insure that all services are accessible to the seniors of Montana.</p>	<p>1983</p>

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.B.2 SERVICE DEVELOPMENT PLAN: GOALS AND OBJECTIVES

This chart specifies the State's overall service delivery goals and objectives for multipurpose senior center activities, nutrition services, legal services, information and referral services, as required, as well as other service delivery objectives representing statewide priorities. Objectives are organized by the following categories: access services, in-home services, community services, services to residents of care providing facilities.

Service Delivery Goal: To optimize all available resources to meet the nutritional needs of older Montanas.

Objectives:

Fiscal
Year

OBJECTIVE ONE: Social and Rehabilitation Services, Aging Services Bureau shall initiate a system that provides the minimum possible outlay for shipment and handling of USDA foodstuffs for those nutrition providers that utilize them.

1981

OBJECTIVE TWO: Social and Rehabilitation Services, Aging Services Bureau will, for cost reasons, establish statewide minimum criteria for home-delivered meal receipt.

1981

OBJECTIVE THREE: Social and Rehabilitation Services, Aging Services Bureau will establish procedures for Area Agencies utilizing III B funds for nutrition purposes to efficiently and effectively maintain program levels while switching to allowable resources.

1981

OBJECTIVE FOUR: Social and Rehabilitation Services, Aging Services Bureau will analyze senior centers not presently utilized as nutrition sites for future conversion as a cost reduction procedure.

1981

OBJECTIVE FIVE: Social and Rehabilitation Services, Aging Service Bureau will establish operational plans with individual PSA's to increase participation in nutrition programs of low-income and minority individuals.

1981
1982
1983

OBJECTIVE SIX: Social and Rehabilitation Services, Aging Services Bureau will, in conjunction with objective (6.2) (multi-purpose senior centers) (#4), provide technical assistance documents on management and cost effectiveness of coordinated program management and operation.

1981
1982
1983

State: MontanaState Agency: Social & Rehabilitation Services - Aging Services Bureau

4.B.2 SERVICE DEVELOPMENT PLAN: GOALS AND OBJECTIVES

This chart specifies the State's overall service delivery goals and objectives for multipurpose senior center activities, nutrition services, legal services, information and referral services, as required, as well as other service delivery objectives representing statewide priorities. Objectives are organized by the following categories: access services, in-home services, community services, services to residents of care providing facilities.

Service Delivery Goal: Have in-home services for senior citizens available in every county of Montana.

Objectives:

Fiscal
Year

OBJECTIVES ONE: Social and Rehabilitation Services, Aging Services Bureau will analyze the availability and effectiveness of existing in-home services in each PSA/county of Montana.

1981

Ben

OBJECTIVES TWO: Social and Rehabilitation Services, Aging Services Bureau, in conjunction with Area Agencies on Aging, establish levels of service requirement for each PSA/county in Montana.

1981

Ben

OBJECTIVES THREE: Social and Rehabilitation Services, Aging Services Bureau will provide direction to Area Agencies on Aging to establish programs in each county that meet required levels of need.

1982

1983

OBJECTIVES FOUR: Social and Rehabilitation Services, Aging Services Bureau will work with other state-level providers (non-AoA funded) to establish a coordinated service and resource utilization system.

1981

1982

1983

Ben

State: MontanaState Agency: Social and Rehabilitation Services - Aging Services Bureau

4.B.2 SERVICE DEVELOPMENT PLAN: GOALS AND OBJECTIVES

This chart specifies the State's overall service delivery goals and objectives for multipurpose senior center activities, nutrition services, legal services, information and referral services, as required, as well as other service delivery objectives representing statewide priorities. Objectives are organized by the following categories: access services, in-home services, community services, services to residents of care providing facilities.

Service Delivery Goal: Have cost effective management in the operation of multi-purpose senior citizen centers in Montana.

Objectives:

Fiscal
Year

OBJECTIVE ONE: Social and Rehabilitation Services, Aging Services Bureau will establish cost effective center management packets that are appropriate to the varying sizes and operational complexity of Montana's centers.

1981

OBJECTIVE TWO: Social and Rehabilitation Services, Aging Services Bureau will work with the Area Agencies on Aging to determine, within each PSA, which centers require which level of management expertise.

1981

OBJECTIVE THREE: Social and Rehabilitation Services, Aging Services Bureau, will work with the Area Agencies on Aging to establish timetables for initiation of cost management techniques identified as appropriate within individual PSA's.

1982

OBJECTIVE FOUR: Determine levels of completion of cost-effective management techniques for timetables established and rework as required.

1983

State: MontanaState Agency: Social & Rehabilitation Services - Aging Services Bureau

4.B.2 SERVICE DEVELOPMENT PLAN: GOALS AND OBJECTIVES

This chart specifies the State's overall service delivery goals and objectives for multipurpose senior center activities, nutrition services, legal services, information and referral services, as required, as well as other service delivery objectives representing statewide priorities. Objectives are organized by the following categories: access services, in-home services, community services, services to residents of care providing facilities.

Service Delivery Goal: Have optimal legal services available for the senior citizens in each planning and service area of Montana.

Objectives:

Fiscal
Year

OBJECTIVE ONE: Social and Rehabilitation Services, Aging Services Bureau will work individually and collectively with the Area Agencies on Aging to establish levels of program required for meeting the legal service needs of the elderly of this state.

1981

OBJECTIVE TWO: Social and Rehabilitation Services, Aging Services Bureau will establish state-level linkages with the Private Bar Association for the purpose of fostering legal expertise and cooperative agreements with members of that association.

1981

OBJECTIVE THREE: Social and Rehabilitation Services, Aging Services Bureau will provide direct assistance and technical assistance memoranda to the individual Area Agencies on development and initiation of legal services for their Areas.

1981

1982

1983

OBJECTIVE FOUR: Social and Rehabilitation Services, Aging Services Bureau will provide leadership and direction to the statewide Legal Advocacy program to coordinate it with the individual Area Agency programs.

1981

1982

1983

State: Montana
State Agency: Social & Rehabilitation Services - Aging Services Bureau

4.C.1 SYSTEM DEVELOPMENT PLAN: POLICIES AND PRIORITIES

Policies and priorities are presented below regarding the State's responsibility for developing a comprehensive and coordinated service delivery system which includes access services, community services, in-home services, and services to residents of care providing facilities.

POLICY

SRS-Aging Services Bureau shall review the guidelines and inventory the resources of the Montana Departments of Social and Rehabilitation Services, Health and Environmental Sciences, Institutions, and Community Affairs which ^{provide} impact the lives of senior citizens.

PRIORITIES

Focal Points: As the need for optimum utilization of resources becomes more evident, alternatives to the provision and location of services must be investigated. One of these alternatives is the possible establishment of community focal points throughout the state. Such points can benefit both service recipient and provider. The former benefits through improved accessibility to services and a broader range of services to better meet their needs; the latter through improved cost effectiveness and maximum coordination as colocation enhances the visibility of the service network.

CONTINUUM OF CARE:

Service systems usually address a specific level of care for a universal group of recipients. To meet the needs of a specific segment of society - the elderly - there are a number of state level providers and regulations to purvey varying degrees of care. Therefore, a broad knowledge of all degrees and levels of care provision by each provider is an integral part of comprehensive and coordinated system of services for the elderly.

State: MontanaState Agency: Social & Rehabilitation Services - Aging Services Bureau

4.C.2 SYSTEM DEVELOPMENT PLAN: GOALS AND OBJECTIVES

The State's overall system development goals and related objectives are presented below.

System Development Goal:

Provide significant input and service direction to the planning and delivery of care related programs for Montana's elderly.

Objectives:

Fiscal
Year

OBJECTIVE ONE: The Social and Rehabilitation Services, Aging Services Bureau will define the membership, direction and activities of a Continuum of Care Council.

1981

OBJECTIVE TWO: The Social and Rehabilitation Services, Aging Services Bureau will establish and operationalize the Council.

1981

OBJECTIVE THREE: The Social and Rehabilitation Services, Aging Services Bureau will review the activities and membership of the Council and modify as needed.

1981
1982
1983

OBJECTIVE FOUR: The Social and Rehabilitation Services, Aging Services Bureau will publicize an annual report on Continuum of Care.

1981
1982
1983

State: MontanaState Agency: Social & Rehabilitation Services - Aging Services Bureau

4.C.2 SYSTEM DEVELOPMENT PLAN: GOALS AND OBJECTIVES

The State's overall system development goals and related objectives are presented below.

System Development Goal:

Provide a comprehensive and coordinated program of services for the elderly of Montana.

Objectives:

Fiscal
Year

OBJECTIVE ONE: The Social and Rehabilitation Services, Aging Services Bureau will inventory the resources of Montana's Human Service Departments which affect Montanas elderly.

1981

OBJECTIVE TWO: The Social and Rehabilitation Services, Aging Services Bureau will annually update the resource inventory.

1982

1983

OBJECTIVE THREE: The Social and Rehabilitation Services, Aging Services Bureau will distribute the resource inventory to Montana's aging network.

1981

1982

1983

OBJECTIVE FOUR: The Social and Rehabilitation Services, Aging Services Bureau will distribute to Montana's Aging Network a technical assistance paper on the state and federal guidelines and regulations which govern the operation of service provision for the elderly.

1981

1982

1983

OBJECTIVE FIVE: The Social and Rehabilitation Services, Aging Services Bureau will evaluate the utilization of the resource inventory and technical assistance paper.

1982

1983

SIX: data to other

human services agencies

State: MontanaState Agency: Social & Rehabilitation Services - Aging Services Bureau

4.C.2 SYSTEM DEVELOPMENT PLAN: GOALS AND OBJECTIVES

The State's overall system development goals and related objectives are presented below.

System Development Goal:

Develop the maximum number of community focal points statewide.

Objectives:

Fiscal
Year

OBJECTIVE ONE: The Social and Rehabilitation Services, Aging Services Bureau will develop and distribute to the Area Agencies the minimum criteria for community focal points.

1981

OBJECTIVE TWO: The Social and Rehabilitation Services, Aging Services Bureau will identify feasible communities for community focal points.

1981

1982

1983

OBJECTIVE THREE: The Social and Rehabilitation Services, Aging Services Bureau will meet with state level service providers to negotiate the colocation of services.

1981

1982

1983

OBJECTIVE THREE: The Social and Rehabilitation Services, Aging Services Bureau will develop and maintain a state directory of community focal points.

1981

1982

1983

State: MontanaState Agency: Social & Rehabilitation Services - Aging Services Bureau

4.C.2 SYSTEM DEVELOPMENT PLAN: GOALS AND OBJECTIVES

The State's overall system development goals and related objectives are presented below.

System Development Goal:

Enable all low-income senior citizens to apply for the low-income energy assistance program being directed by the Montana Department of Community Affairs.

Objectives:

Fiscal
Year

OBJECTIVE ONE: The Social and Rehabilitation Services, Aging Services Bureau will establish, through contact with the Department of Community Affairs, program guidelines and eligibility.

1981

OBJECTIVE TWO: The Social and Rehabilitation Services, Aging Services Bureau will formalize the efforts of coordination for identification of qualified seniors through I & R and outreach programs.

1981

OBJECTIVE THREE: The Social and Rehabilitation Services, Aging Services Bureau will institute efforts, through Area Agencies on Aging, of locating and assisting seniors to apply for benefits of program.

1981

OBJECTIVE FOUR: The Social and Rehabilitation Services, Aging Services Bureau will continue efforts of coordination, locating, and assistance to seniors as program longevity and funding will allow.

1982

1983

SECTION 5: FINANCIAL PLAN

5.A Allotment Revisions and Adjustments for FY 81								
Modifications	Allotments	State Agency Administ. Allotment	Social Services Allotment	Congregate Nutrition Services Allotment	Home Del. Nutrition Service Allotment	Special Applications Area Plan Administ. Program	Ombudsman	TOTAL
1. Formula Allotments		300,000	1,222,501	1,336,500	247,500			3,106,501
2. Increases 1321.57; 1321.197(b)(2)		+ -0-	+ -0-	+ -0-	+ -0-			+ -0-
3. Deductions 1321.57; 1321.197(b)(2) 1321.205		(-0-)	(-0-)	(-0-)	(-0-)			(-0-)
4. Revised Allotments		300,000	1,222,501	1,336,500	247,500			3,106,501
5. Additional funds for Administration* 1321.195		+ -0-	(-0-)	(-0-)	(-0-)			
6. Supplement Area Plan Administration 1321.197(a)(2)		(35,000)				+35,000		
7. Supplement Social & Nutr. Services**1321.197(3)		(-0-)	+ -0-	+ -0-	+ -0-			
8. Support long Term Care Ombuds. Prog*** 1321.159			(20,000)				+20,000	
9. Title III Funds for State Agency Expenditure		265,000					20,000	285,000
10. Shift Congregate to Home Delivered Nutrition**** 1321.191				(-0-)	+ -0-			
11. Shift Home Delivered to Congregate Nutr.**** 1321.191				+ -0-	(-0-)			
12. Title III Funds for Allocation to Area Agencies			1,202,501	1,336,500	247,500	35,000		2,821,501

* Approval may be given to use up to 3/4 of 1% of social and nutrition services allotment for State Agency Admin

** Commissioner's decision.

*** Up to 1% of the Social Services allotment of \$20,000 whichever is greater, may be used for the Long Term Ombudsman program.

**** State decision if amount shifted is 15% or less of source allotment; if shift is greater than 15%, application must be made to Commissioner for approval.

State: Montana

State Agency: Social and Rehabilitation Services - Aging Services Bureau

5.B STATE AGENCY OPERATING BUDGET FOR FY 1981

TOTAL RESOURCES TO BE USED AT STATE AGENCY LEVEL

	<u>TITLE III</u>	<u>Match to Title III</u>	<u>Other Agency Resources</u>	<u>Total Agency Budget</u>
. Title III: State Admin.	<u>\$265,000</u>			<u>\$265,000</u>
. Title III: (Part B) Long-Term Care Ombudsman Program*	<u>\$ 20,000</u>			<u>\$ 20,000</u>
. Other Older Americans Act Funds			<u>\$80,000</u>	<u>\$ 80,000</u>
. Other Federal Funds		<u>\$ -0-</u>	<u>-0-</u>	<u>-0-</u>
. State		<u>\$66,918</u>	<u>-0-</u>	<u>\$ 66,918</u>
. Local Public		<u>\$ 3,530</u>	<u>-0-</u>	<u>\$ 3,530</u>
. Other		<u>\$21,415</u>	<u>-0-</u>	<u>\$ 21,415</u>
TOTAL	<u>\$285,000</u>	<u>\$91,863</u>	<u>\$80,000</u>	<u>\$456,863</u>

*Title III social service funds (Part B) are used directly by the State Agency only for purposes of operating the Long-Term Care Ombudsman Progress.

State: Montana

State Agency: Social & Rehabilitation Services - Aging Services Bureau

5.C STATE PROGRAM ALLOCATIONS BY PLANNING AND SERVICE AREA FOR FY 1981

(1) <u>Planning and Service Area</u>	(2) AAA <u>Title III</u>	(3) AAA <u>Other</u>	(4) Other <u>Agencies</u>	(5) <u>Total</u>
I	367,266	34,965	-0-	402,231
II	481,826	46,994	-0-	528,820
III	511,929	48,523	-0-	560,452
IV	298,686	33,850	-0-	332,536
V	368,214	32,978	-0-	401,192
VI	544,040	53,164	-0-	597,204
VII	249,540	22,017	-0-	271,557
PSA Subtotals	<u>\$2,821,501</u>	<u>\$272,491</u>	\$ -0-	\$3,093,992
Other (Undifferentiated)			\$ -0-	\$ -0-
TOTAL ALLOCATIONS	<u>\$2,821,501</u>	<u>\$272,491</u>	\$ -0-	<u>\$3,093,992</u>

SECTION 6: STATE PLAN ATTACHMENTS

7.A INTRASTATE FUNDING FORMULA

Following is a description of the formula used to allocate resources in accordance with §1321.49 and a summary of comments received on it. This material is not subject to Plan approval.

INTRASTATE FUNDING FORMULA

1. Allocate the 8.5% of Title IIIB allowed for area agency administration equally to all area agencies.
2. Allocate the Title III C 2 and the program portion of the Title III B to the area agencies by the 60/20/20 formula - sixty percent (60%) based on the total 60+ population in the PSA; twenty percent (20%) based on the total low-income 60+ population in the PSA; twenty percent (20%) based on the total minority 60+ population in the PSA.
3. Allocate any new Title III C 1 funds by the 60/20/20 formula with the 60%/40% adjustment - - sixty percent (60%) of all new funds to those area agencies receiving less according to the formula; forty percent (40%) to all PSA's based on their existing funding level.
4. In the event of no additional Title III C 1 funds available in October, 1980, maintain the present allocation level of Title III C 1 to all PSA's.

Reasons:

1. The equal division of the 8.5% of Title III B meets 1321.49(b)(1) requirements.
2. Sixty percent (60%) based on the total 60+ population meets 1321.49(b)(3) requirements.
3. Twenty percent (20%) based on the 60+ low income population and twenty percent (20%) based on the 60+ minority population meets 1321.49(b)(4) requirements.
4. Maintaining the present level for Title III C 1, allocating additional funds with the 60%/40% adjustment and allocating Title III C 2 by the 60/20/20 formula meets the 1321.185 requirements.
5. Since allocations of all titles have increased since FY '78, Cascade and Yellowstone Counties are the only places defined as urban, the above proposed allocation formula meets 1321.49(b)(2) requirements.

CONSULTATION:

On April 15, 1980, a memorandum with the above information was sent to all Area Agencies, Nutrition projects (formerly Title VII), and members of the State Advisory Council. The memo requested comments on the formula by May 2, 1980, either pro or con. None were received.

